

IBIS Training Details

revised September 14, 2006

WARNING: It may be necessary to reschedule these courses. Final details are being arranged.

Important Note: all these courses are "pre-configuration" training, intended for staff who will be installing and customizing Peoplesoft. This is NOT USER TRAINING. These courses will cover generic Peoplesoft software, it will not be the software we will customize for Wisconsin. User training comes later.

Notes:

- Students should obtain permission to attend these training sessions, using the employing agency's usual policies and procedures.
- Recording of attendance of this training should be the same as for any other training.
- Courses with the same name are intended to be identical, even though the provider may differ.
- You must take the "Introduction" before you can take "General Ledger"
- A brief description of each course is on the next page.

Classes Provided by Inacom	Classes Provided by Oracle/Peoplesoft
10/05 - Introduction to PeopleSoft for FMS (Financials) and SCM (Supply Chain Management) Rel 8.9 (one day) 10/06 - Introduction to PeopleSoft for FMS (Financials) and SCM (Supply Chain Management) Rel 8.9 (one day) 10/17-10/20 - General Ledger (4 days)	09/28 - Introduction to PeopleSoft for FMS (Financials) and SCM (Supply Chain Management) Rel 8.9 (one day) 09/29 - Introduction to PeopleSoft for FMS (Financials) and SCM (Supply Chain Management) Rel 8.9 (one day) 10/10 - 10/13 - General Ledger (4 days)
Location: Inacom 3001 W. Beltline Hwy, Madison, WI	Location: Greenbrier and Russel 8383 Greenway Boulevard, Suite 200, Middleton, WI
Cost: Introduction: \$275 GenLedger: \$1100	Cost: Introduction: \$477 (note: final cost still being determined) GenLedger: \$1908 (note: final cost still being determined)
Who Pays? The employing agency of the student pays all costs, including the course fee and any mileage or other associated costs, unless it has been agreed by all parties that the student will serve as a "Business Analyst" for the IBIS Project (meaning the person will be working 80% on the project). For Business Analysts, the IBIS Project pays the cost.	(Same as for Inacom training - in left column)
Intended Audience (in order of priority) <ul style="list-style-type: none"> • IBIS Team Members (12 people) • IBIS Project "Business Analysts" who work on IBIS 80% time • Subject Matter Experts who have been involved with the IBIS Project teams • Developers (computer programmers) who will support IBIS during and after implementation • Tech Support staff, database analysts, and other technicians who will be working with IBIS • Business staff (end users) in agencies • Others who may be interested 	(Same as for Inacom training - in left column)
How to request to attend: 1. Send an e-mail to DOAIBIS@wisconsin.gov - include names of all students, agency, class name and class date 2. Await an e-mail acknowledging receipt of request. 3. After receiving the e-mail, follow the procedures on the next page.	How to request to attend: 1. Send an e-mail to DOAIBIS@wisconsin.gov - include names of all students, agency, class name and class date 2. Await an e-mail acknowledging receipt of request 3. You will receive a second e-mail confirming your registration 4. Show up for class and sign in there.

<p>Inacom registration procedures</p> <p>4. If you are from DOA or DWD, For DOA, Org ID: WI-DOA/DET; password: DOADET For DWD, Org ID: WI-DWD; Password: WIDWD If you are not from DOA or DWD call Doug Randall at Inacom 661-7822 to get a login ID and password.</p> <p>5. Go to http://training.state.wi.us</p> <p>6. Click IT Curriculum</p> <p>7. Click Log in</p> <p>8. Click Course Catalog</p> <p>9. In the Course Category Box, select PeopleSoft</p> <p>10. Click Search</p> <p>11. Click Register (next to desired course)</p> <p>12. Complete the Individual Details Side (Use your current agency's business address)</p> <p>13. Under Organization Details, Select Invoice</p>	
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Questions, comments, problems? Send an e-mail to: DOAIBIS@wisconsin.gov

Description of Courses:

Introduction to PeopleSoft for FMS (Financials) and SCM (Supply Chain Management) Rel 8.9 (one day)	
<p>The Introduction to PeopleSoft for Financials and SCM course introduces students to concepts used in all PeopleSoft Financial and SCM products. Students learn how to navigate the PeopleSoft menu structure and how to personalize the display of content. Students are introduced to PeopleSoft table structure and the sharing of data across several tables through tableset sharing. Effective dating and row statuses are also covered in this course.</p> <p>Besides concepts common to most PeopleSoft applications, this course also introduces Financials and SCM specific topics such as ChartField accounting and PS/nVision reporting. The course also covers high-level integration points between financials and SCM products.</p> <p>Learn To: Navigate the PeopleSoft menu structure; Personalize the display of content; Use effective dating</p> <p>Suggested Prerequisites: Basic understanding of relational databases; General knowledge of Windows environment.</p> <p>Course Objectives:</p> <ul style="list-style-type: none"> • Describe PeopleSoft integration within Financials and SCM • Navigate through PeopleSoft Financials and SCM • Identify the way PeopleSoft stores data • Explain PeopleSoft reporting tools 	
	<p>Course Topics:</p> <ul style="list-style-type: none"> • Navigating PeopleSoft Applications • Understanding System Structure • Defining Business Units and Set IDs • Using PeopleSoft Process Scheduler and Reporting Tools • Utilizing ChartFields

General Ledger
<p>This course teaches the fundamental concepts and features of the Peoplesoft General Ledger. Participants gain an understanding of how to establish, process, and report on financial transactions. Through real-life examples and hands-on lab activities, participants learn how to establish GL business units, define general options, enter and post journals to a ledger, close year-end books, and create financial reports with PS/nVision. Other topics covered in course include interunit accounting, summary ledgers and chartfield combination editing.</p> <p>Prerequisite: Introduction to PeopleSoft for FMS and SCM</p> <p>Course Objectives:</p> <ul style="list-style-type: none"> • Create and use business units and setids • Open/close multiple business units and ledgers • Define chartfields, ledgers, and calendars • Define new trees using Tree Manager • Enter and post journal entries to a ledger • Close interim and year end books • Create PS/nVision reports